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Organizational Development/Sustainability
Status Assessment Instrument (ODSS)

Family Planning Management Development (FPMD)
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Family Planning Management Development Project (FPMD)
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This instrument is designed to obtain information which will assist in assessing the sustainability of international efforts to support the development and expansion of access to family planning/reproductive health services. Efforts to measure the sustainability of the programs and outcomes achieved through these efforts are being developed using available information. However, these data do not provide information on the development of the organizations whose activities contribute to the program. This instrument has been designed to respond to this need.

The Organizational Development/Sustainability Status assessment instrument (ODSS) provides a consistent basis for assessing and tracking the status of development of key management components of an organization. Based on the Institutional Development Framework utilized by the Family Planning Management Development (FPMD) project, its goal is to provide a simple means for mapping the relative stage of development of an institution's management components and using these results for planning development and monitoring progress. The instrument identifies levels of management performance with the first stage reflecting the weakest performance (with respect to each specific management component) and higher numbered stages indicating better performance. In this sense, progress through the stages implies better management which equates with improved sustainability, defined as the ability to continue to perform in the face of various changes in the operating context--one of which is the loss of donor funding.

The ODSS is designed only to provide a general overview of the relative stage of development of key management components. This information will be used to develop indicators of the general level of organizational sustainability within programs and to track improvements in these levels over time. Although not designed as a self-assessment instrument, it has been demonstrated to be a useful first-step in such a process.   However, as a general tool, the objective is to identify the critical components of organizational development while recognizing that only a few of the many important reference criteria are included. An institutional assessment for purposes of identifying specific development priorities would need to be developed from a much wider range of observations and organizational participation.

The management components selected are common to all organizations and the stages of their development can be described in general terms that are appropriate to all institutions. These general terms serve as reference criteria for which different indicators will be appropriate in different types of institutions. The reference criteria which characterize each stage, therefore, reflect functions and not forms. In particular, we want to make sure that progress from stage 1 reflects improved performance with respect to the management component, not simply more complexity.

For example, for all service providing institutions, the ability to assure supply of commodities is equally critical. However, appropriate organizational indicators of assured long-term adequacy of commodity supplies might include the presence of a complex system of procurement, storage, delivery, and tracking in a large multi-setting organization while the same level of performance could be obtained in a small single site service delivery organization with a simple acquisition and storage procedure.

The argument is that all organizations need to carry out similar management functions and as the organization develops, these functions will be carried out at a more advanced <u>although not necessarily more complex</u> level. We want to measure each reference criterion in ways that are applicable to the type of setting being assessed. The current version of the assessment instrument simply describes the reference criteria and leaves it up to the user to decide on the specific indicators for these criteria. One objective of the field testing has been to generate sufficient shared experience to permit the development of more specific indicators for settings where that seems both feasible and appropriate.

How to use the instrument

The ODSS is organized in three sections:

> 1. A general description of the organization, its history, its operating scale, and its current geographic and activity focus;

> 2. a mapping of the stages of development of key management components; and

> 3. A form for recording additional information about the relationship of the organization to the national program.

Each ODSS applies to a single organization and is designed to be used by persons with general familiarity with the organization without requiring much additional data gathering. It would be expected that project officers, regional staff, and program support staff within and outside of the organization could provide most of the required information.

Our intention is to make the ODSS available to groups and individuals who are willing to use it and provide feedback related to that experience. Three types of information in addition to the completed forms are of interest:

> 1. Ease of application--Is the format straightforward and adequately explained? Were you able to use the instrument without much preparation? What changes in format or additional information would have been helpful?

> 2. Reference criteria and Indicators utilized--Were the reference criteria clear? What specific attributes or activities were used to determine the specific stage for each management component? (In more technical terms, we would like to know what indicators were used to link the organization to the specific reference criteria selected. We are compiling sets of indicators which have been applied to specific types of organizations. This material will be included in later versions and will permit users to modify the instrument to incorporate indicators specific to the type of target organization.)

> 3. Coverage--Are there dimensions of the organization which you regard as important which are NOT incorporated in the information collected in the instrument? Are there reference criteria and/or subcategories of the management components which could be added to strengthen the instrument?

Additional comments and suggestions are invited. Please provide this feedback by sending your completed forms and other comments to Gerald Rosenthal, Management Sciences for Health, 165 Allandale Road, Boston, MA 02130. Additional comments and inquiries can also be sent through e-mail to grosenthal@msh.org